IMAS User Guide and Manual

Instructions for the use of
Idaho's Management and Accountability System

Table of Contents

Special thanks to Arkansas Adult Education and Tracy Andrews for allowing us to use and revise their manual.

HOW TO USE IMAS

A flow-chart outlining the process for entering registration information into IMAS and obtaining approvals can be found at the end of this instructional section

- IMAS web address: http://imas.sde.state.id.us
- Login will be the user's email address, lower case with no spaces. The original password is "imas." This will need to be changed in order to protect Program data. At first login, click on "User List" on left menu bar. Click on user's name. Put in new password and confirm by re-entering password.
- This will be the first screen when you log on for the first time (Figure 1). Each Program will be set up with the user's email address (lower case, no spaces).

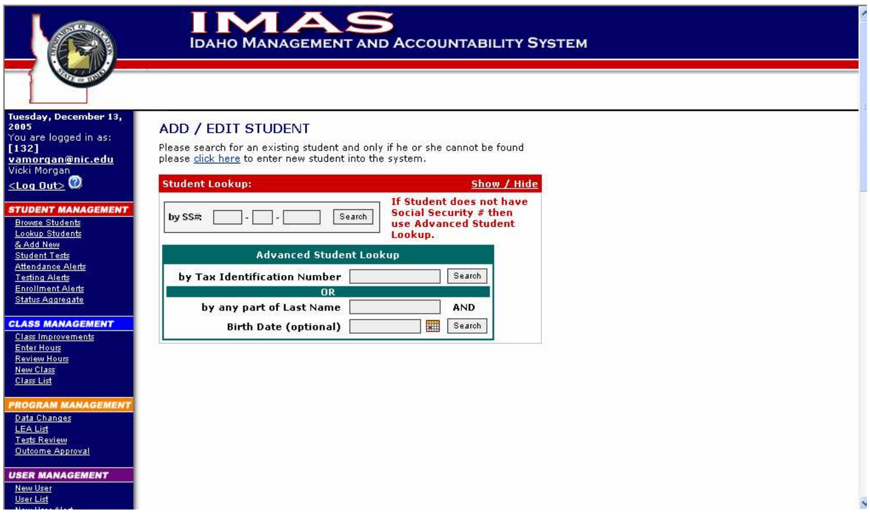


Figure 1

- Teacher: This role is determined by the director. Directors will use teachers' email address for login and can let them choose their own password or assign them a password. (*Be sure to use your email address for login.)*

  A *VIEW-ONLY TEACHER* can
  - View class information,
  - View student list,
  - View student details,
  - View students test, and
  - View reports.

  A VIEW-ONLY TEACHER cannot
  - Enter data or edit data.

  A TEACHER can
  - Enter students,
  - Edit students,
  - Enter test scores,
  - Edit test scores before approval,
  - Enter attendance hours,
  - Edit attendance hours before approval,

- Add student outcomes,
- Separate students, and
- View reports, attendance, and testing alerts.

A TEACHER cannot
- Add users,
- Add classes, or
- Change roles.

A TEACHER ADD CLASS
- Is assigned by the state office to individual teachers in a specific Program.

➤ Program viewer: This role is a view-only permission level for those in the Program (for example: deans or presidents who would like to be able to log on and look at Program level data). The director must set up this user and password. Use email address for login at this level also.

Navigational Menu Bar

The navigation menu bar on the left side of the page is divided into **"Student Management," "Class Management," "Program Management," "User Management," and "Reports."** (Figure 2). Each title bar is color-coded, and the colors are reflected for each section throughout the system. There are subtitles under each title bar; your assigned user role status will determine the number of subtitles accessible to you.

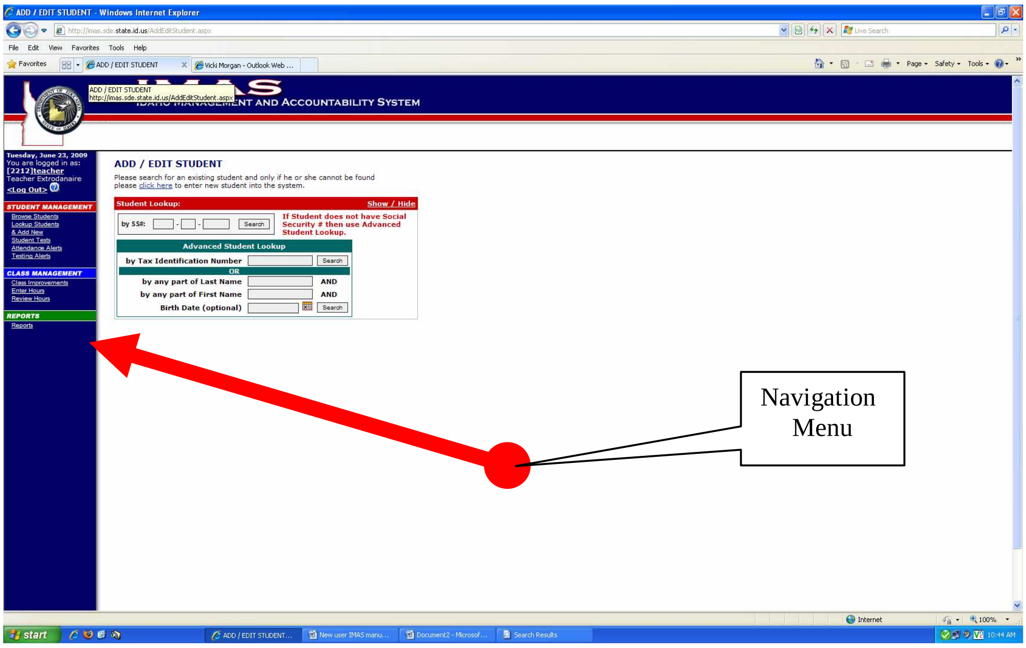


Figure 2

Getting Started

"User Management"
- Enter users by clicking on "**New Users**" on left menu bar under **"User Management."**
- Enter all personnel, including paraprofessional and all literacy council tutors, using email address (lower case, no spaces) as login. Assign or have them select a password.
- Change password if already set in the system as a user.

- Complete all information on each user. This will enable Table 7 to be correct. Programs keep this information current.

Under "Class Management"

- Create classes by a name that can be easily identified. **Do not** use a date in the class name. Once created, these classes will role over from one fiscal year to the next. Just a note—it is probably a good idea not to use teacher names as part of class name. Teachers come and go. Each class name needs to be unique within a Program.
- Assign a teacher to class and his or her role related to the class.

Under "Student Management," click "Look Up Students & Add New." You will get the "ADD/EDIT STUDENT" screen.

1. You must first check to make sure that your student is not in the system.
   To do this, type in the Social Security number in the "**Student Lookup**" box or the student last name and first name and/or birth date in the "**Advanced Student Lookup**" box and then click "Search." If the student is ESL or declined to provide a Social Security number, type in either the assigned identification number OR the student's last name and first name and/or birth date and click "Search" (Figure 4).

2. To avoid duplicates in the system, you might check both SSN and last name/first name. Occasionally there will be someone entered into the system with an erroneous SSN and then re-entered when the look-up could not find them. It is a good idea to double check by doing both look-ups.

Student Management: Look Up Students & Add New

If the student does not exist in the system, the message "no results found" will appear in red at the bottom of the "ADD/EDIT STUDENT" screen (Figure 4).

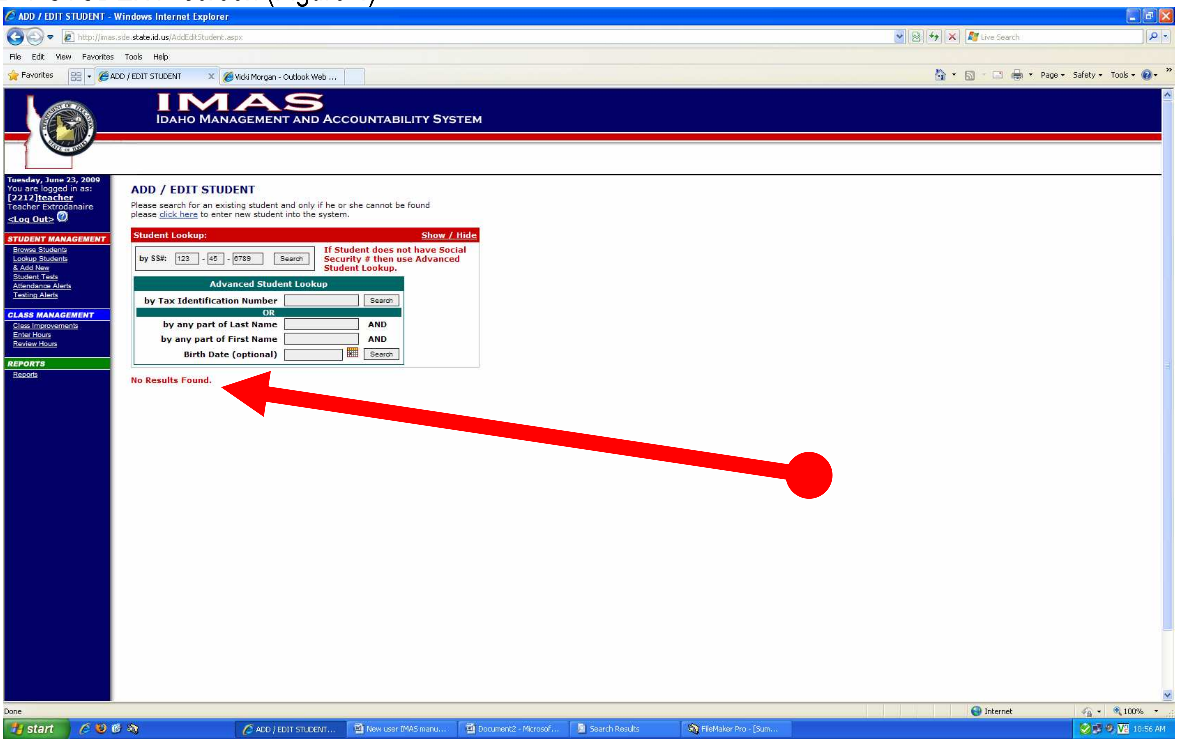


Figure 4

Click on the blue link "click here" (located in the paragraph right under the "ADD/EDIT STUDENT" heading) to go to the student entry screen, "STUDENT BIO" (Figure 5).

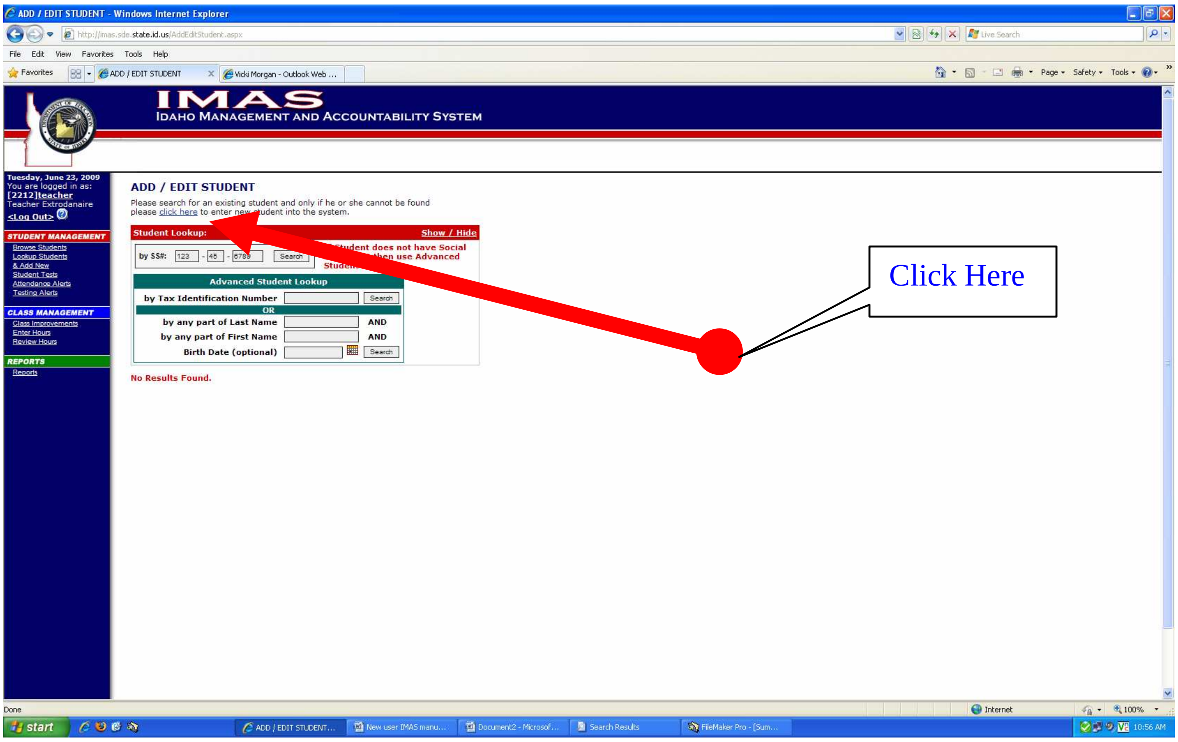


Figure 5

2. If this is a student who supplied a Social Security number, input student's Social Security number and begin entering student data. *Fields in red (Social Security Number, Date of Birth, Last Name, etc.) indicate that you must input the information into the field*. The small box to the right of the Date of Birth field is a calendar. You may click on the calendar and choose the date from there, or you may manually input the birth date. If you manually input the date, use the format mm/dd/yyyy. (Use slashes, /, and not dashes, -.)

Generate a Student I.D. Number

3. If you are inputting a new student (ESL or student who did not supply a SSN), you must enter the required field information BEFORE you can assign that student a number. To begin entry, input the Date of Birth, First Name, etc., until you have input information in the last field required for this screen. Then go back to the beginning of the screen and click under the Social Security field where it tells you "**If student does not have SSN click here**." The message will change to read "**If student doesn't have Federal ID Number, assign Student Number**." You have the choice to "Click here to generate EIN" or "Click here to add SSN." If you try to assign a number before inputting student information in the required fields, it will appear that nothing happens. However, if you go to the bottom of your screen, you will see the error messages telling you to fill in required information. Entry for all students without a Social Security number must be done in this order. You will now follow instruction #4. Once you have acquired the EIN, be sure to document that number or print the page for the student file. Once you continue to the next screen, the EIN will be hidden from view.

4. When you get to the end of the first entry screen, you will click on the "**Enter New Student Bio and continue**" box at the bottom (Figure 6). Notice that the "**Current Registration**" status shows "**not registered**." This will be updated when enrollment is complete.

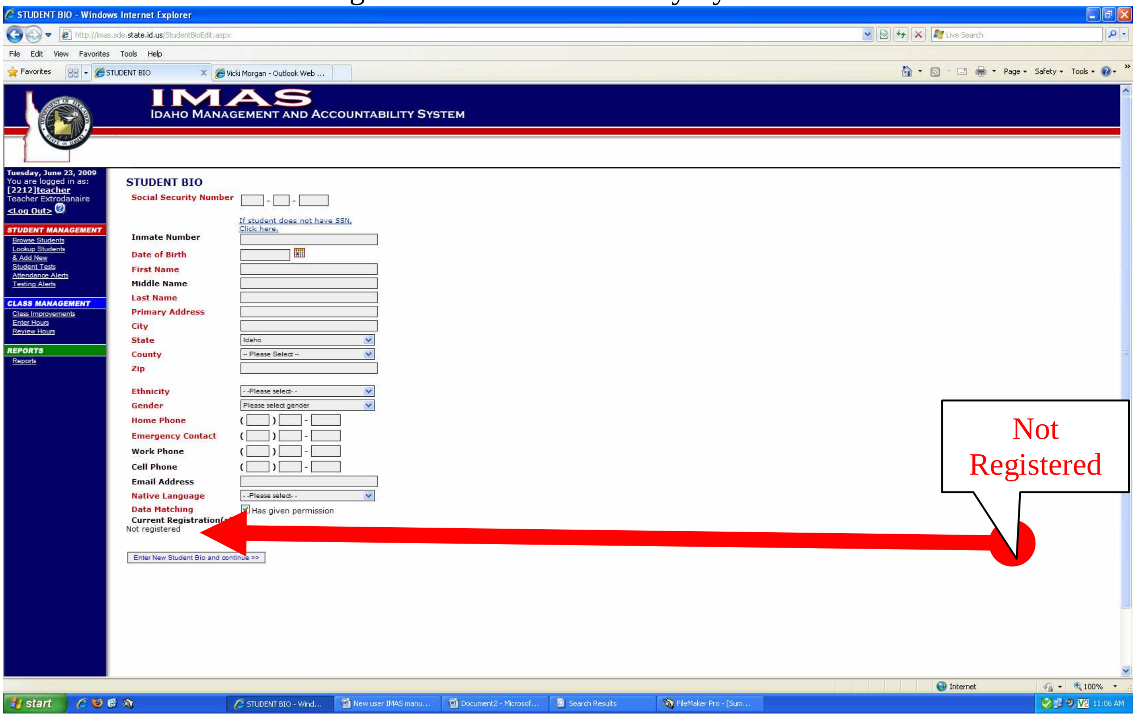


Figure 6

5. After clicking on the “Enter New Student Bio and Continue” box, you will go to the “STUDENT REGISTRATION” screen (Figure 7).

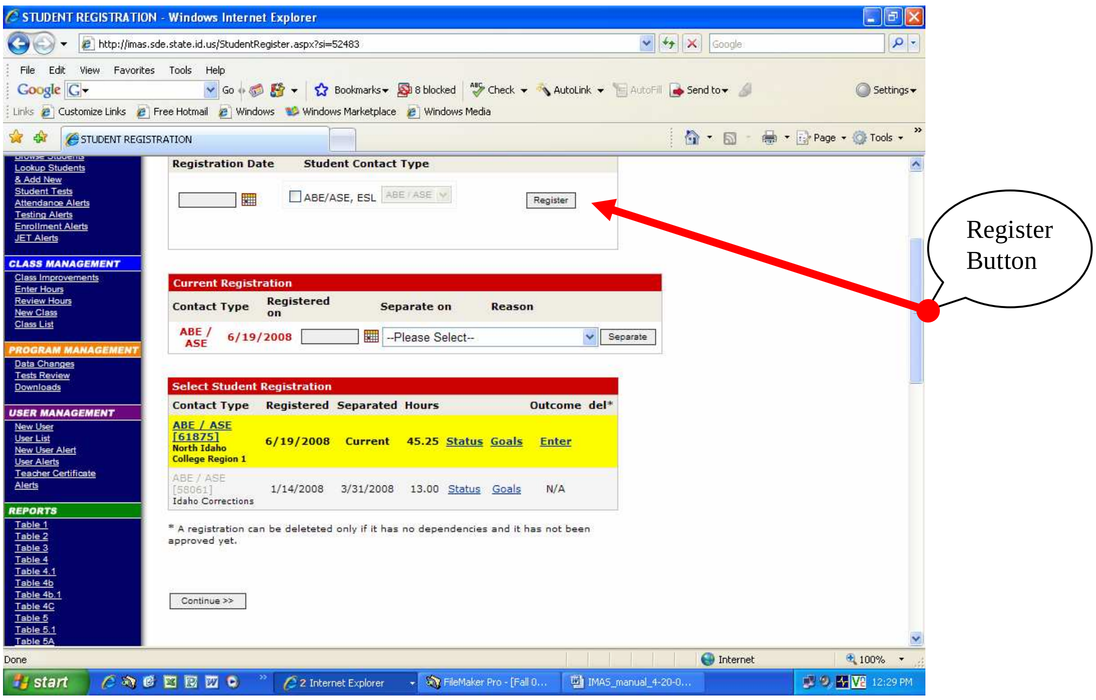


Figure 7

6. You will enter the Date of Enrollment (contact date) under the **Registration Date** field of the “**Renew Student Registration**” box. You also will enter the **Student Contact Type**, which will be either ABE/ASE (regular students) or ESL (for English as a Second Language students). Then click the “**Register**” button located to the right of the contact

type in the same box (see Figure 7 above). Once the student has been registered as ESL, he or she can progress to become an ABE/ASE student. A student can now be registered in more than one region at a time. The active (the one you are working in) is highlighted in yellow. The inactive one is green. Click on the one you want if it is not yellow. They will each have entered their own Registration date, contact type and click on "Register". A student could conceivably be ABE/ASE with one region and ESL with another. This eliminates the worry about separating a student from your region if another region has them registered with them. The 1st region to register the student and achieve the 12 hours is the one that will be counted on the state report although both regions will see their student on their own regional report.

7. After successful registration, a message will appear at the bottom of the "STUDENT REGISTRATION" screen in red stating "Student has been registered!" (Figure 8).

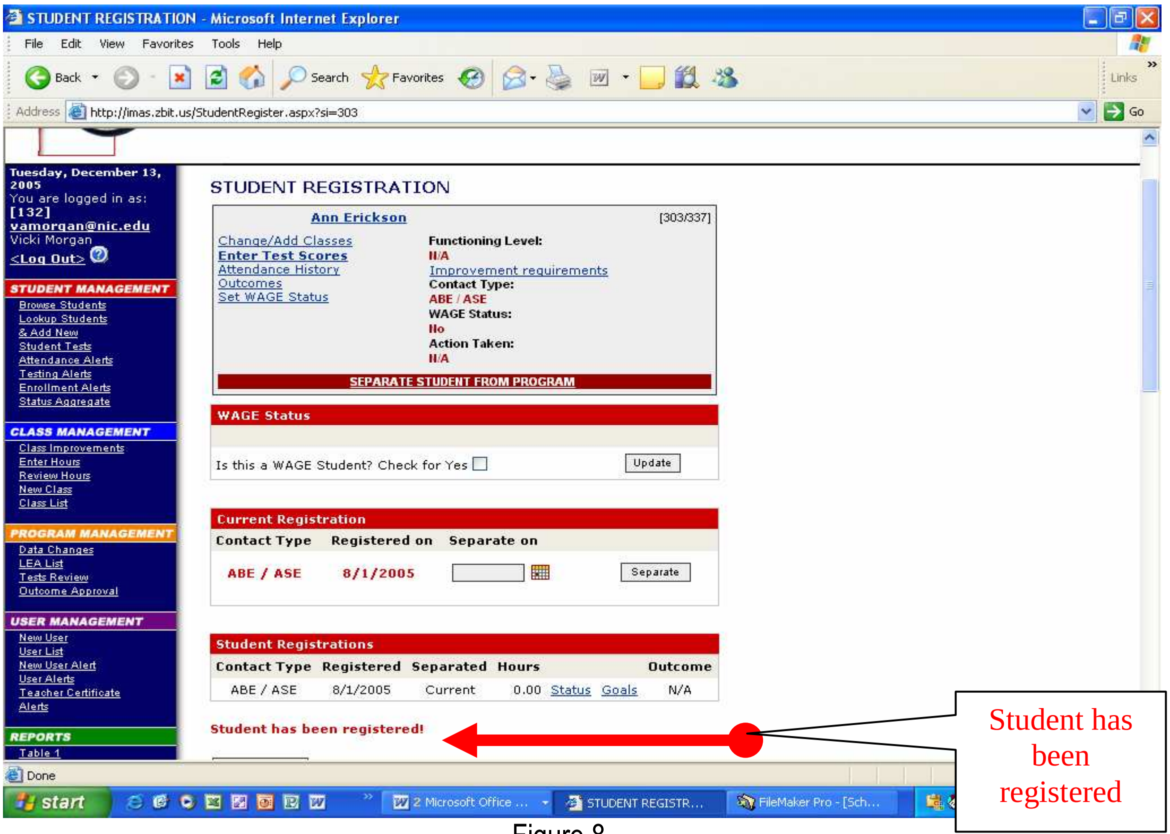


Figure 8

A "Separate" option is now listed also. This feature is to allow you to separate a student from the Program. It does not mean that the student you just entered is separated.

8. Click "**continue**" at the bottom of the "STUDENT REGISTRATION" screen to go to the next screen, "STUDENT CLASS PLACEMENT" (Figure 9). You will enroll the student in a class here. Classes that you created earlier will be listed in the "Enroll In *Program Name*" box. To add your student to a class, click the box under "ADD" in the "Enroll in *Program Name"* box, and a check will appear. You will then click on the "**Update Class Enrollment and Continue**" to enroll the student in class. *Note: You MUST put a check in the "Add" box for the class in which the student will be enrolling, or else the student will not appear in any class, even though you have registered that student*. This system makes a distinction between registering a student and enrolling a student into a class (enrollment). You may choose to skip this step and enroll the student later (but it is not advisable), in which case you would click "**Skip Enrollment**." The "Skip" feature allows you to complete inputting the demographic information before inputting test scores. If a student is not enrolled in a class, they will not appear on the approvals page for anyone except state users.

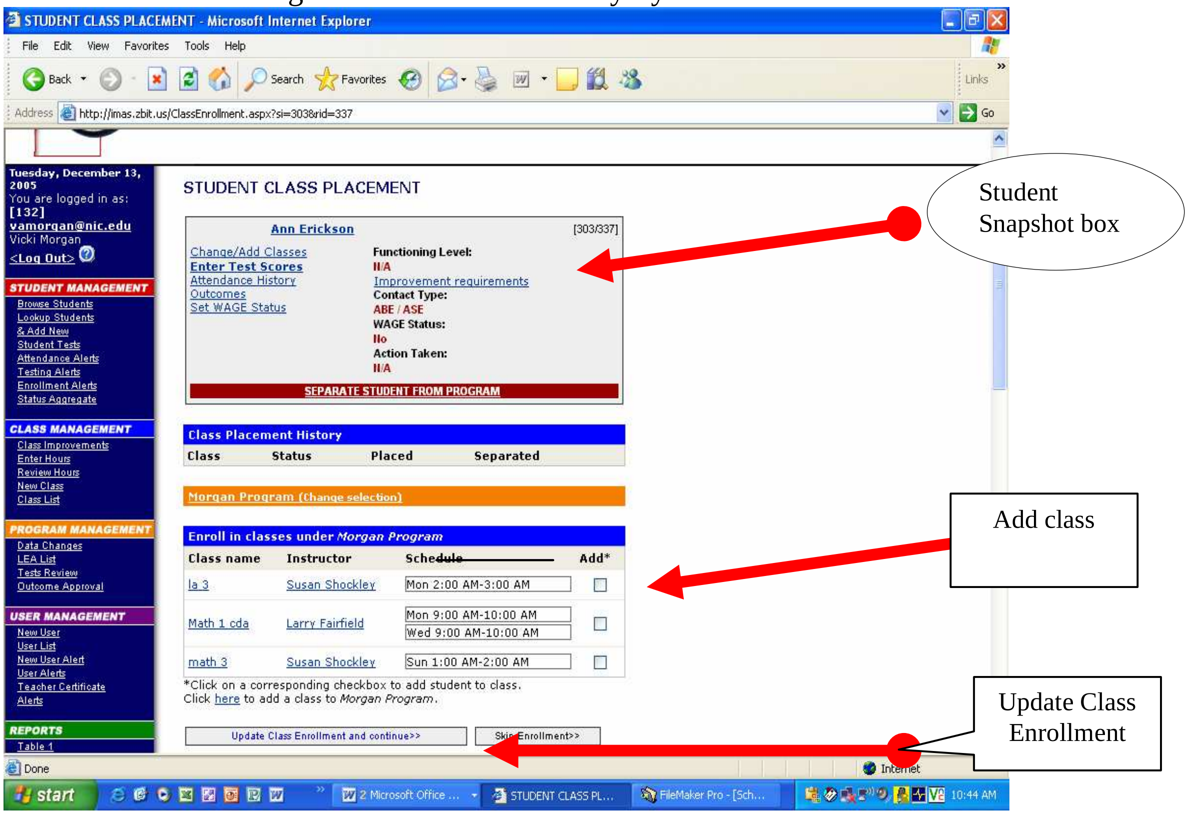


Figure 9

9. The next screen to appear is the “STUDENT STATUS AND NEEDS.” You will continue inputting student demographic data on this screen (Figure 10).

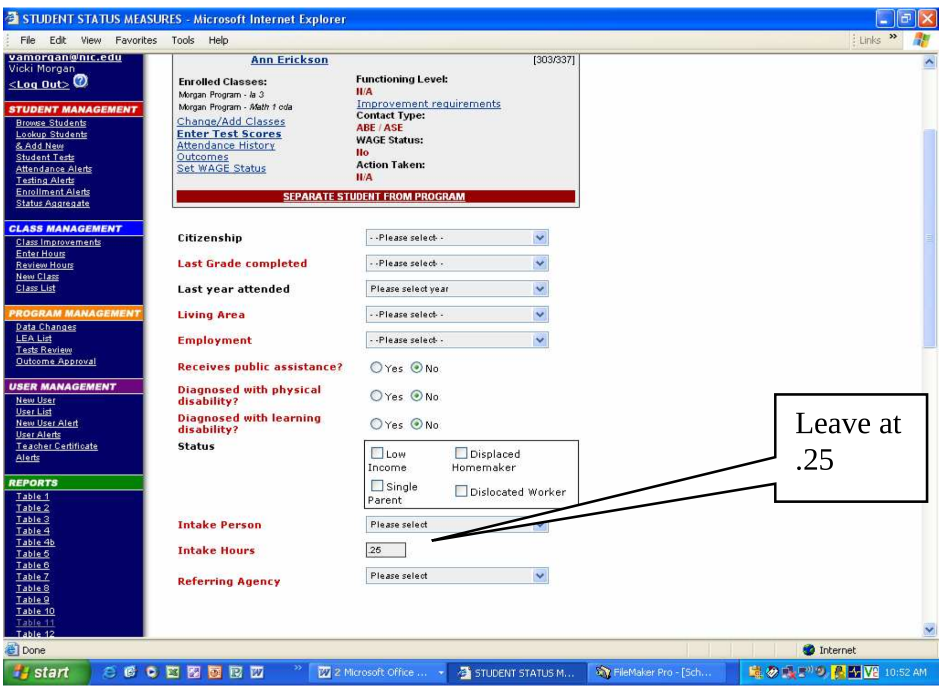


Figure 10

10. After inputting, click "**Update Status and Continue**" (Figure 11). Once this has been entered and submitted, you will no longer have access or see the information entered. Teacher level cannot edit this section once you move on. If it needs to be edited/changed, contact the regional/state office.

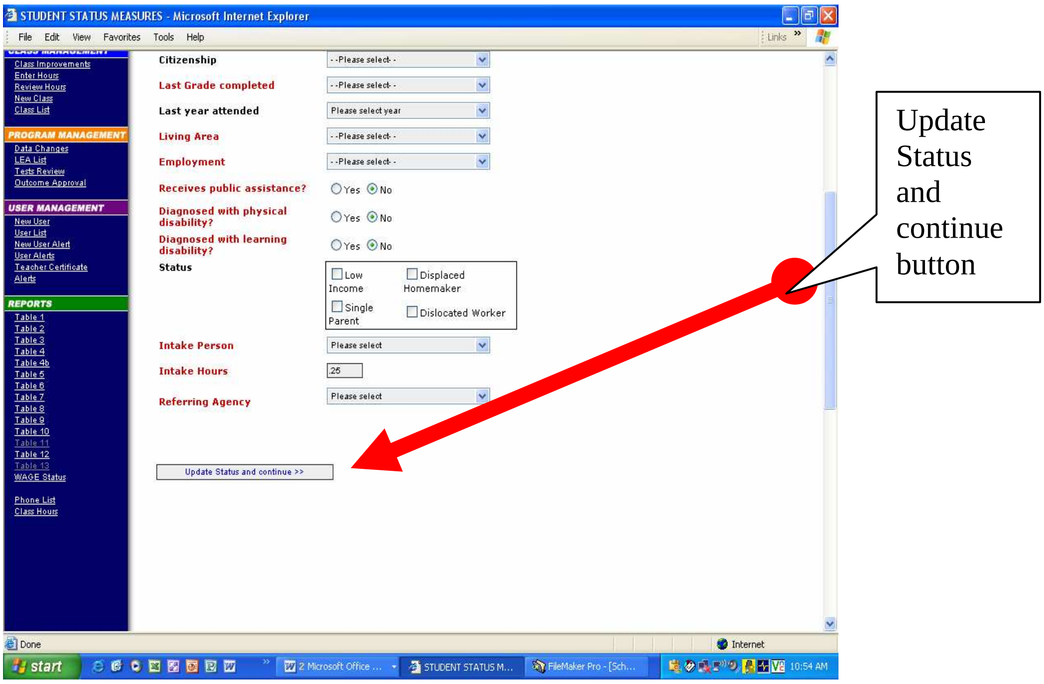


Figure 11

11. You are then taken to the "STUDENT TESTS" screen (Figure 12). Under the "Programs Select Test Options," you will choose the appropriate test. You may choose TABE or CASAS for ABE/ASE; if your student is classified as an ESL, you will only be able to select tests that correlate with that contact type (BEST, CASAS).

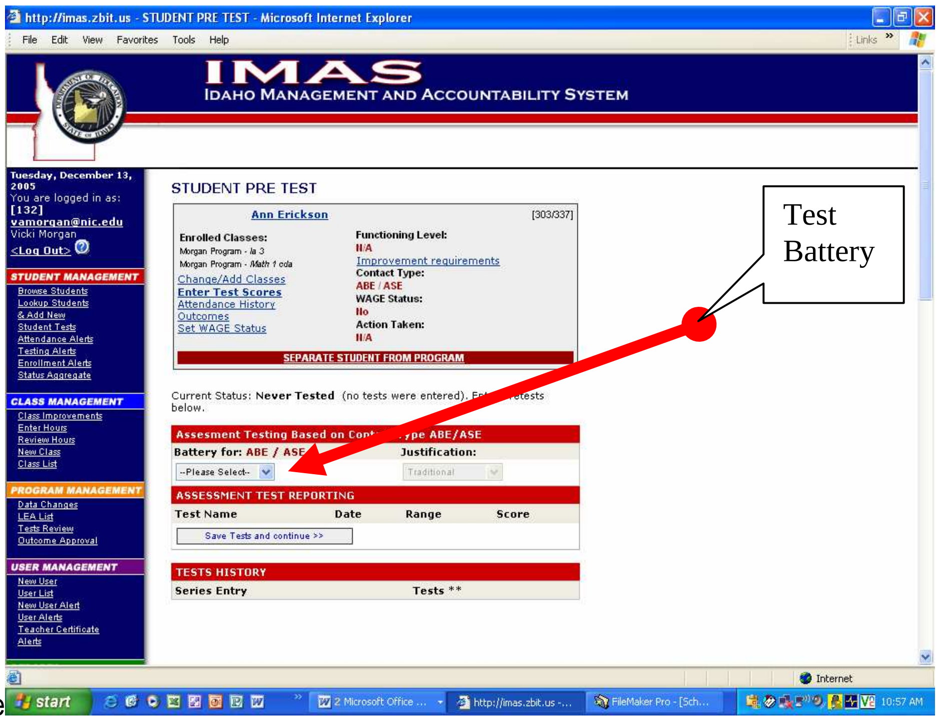


Figure 12

12. After selecting the appropriate test, you are taken to the "STUDENT TESTS" screen (Figure 13). The "**Programs Select Test Options"** box already has the **Test Battery** you entered; under "**Justification**," you will choose one of the three options—"Traditional" for entering three subject area scores, "Nontraditional 1" for entering one subject area score, and "Nontraditional 2" for entering two subject area scores.

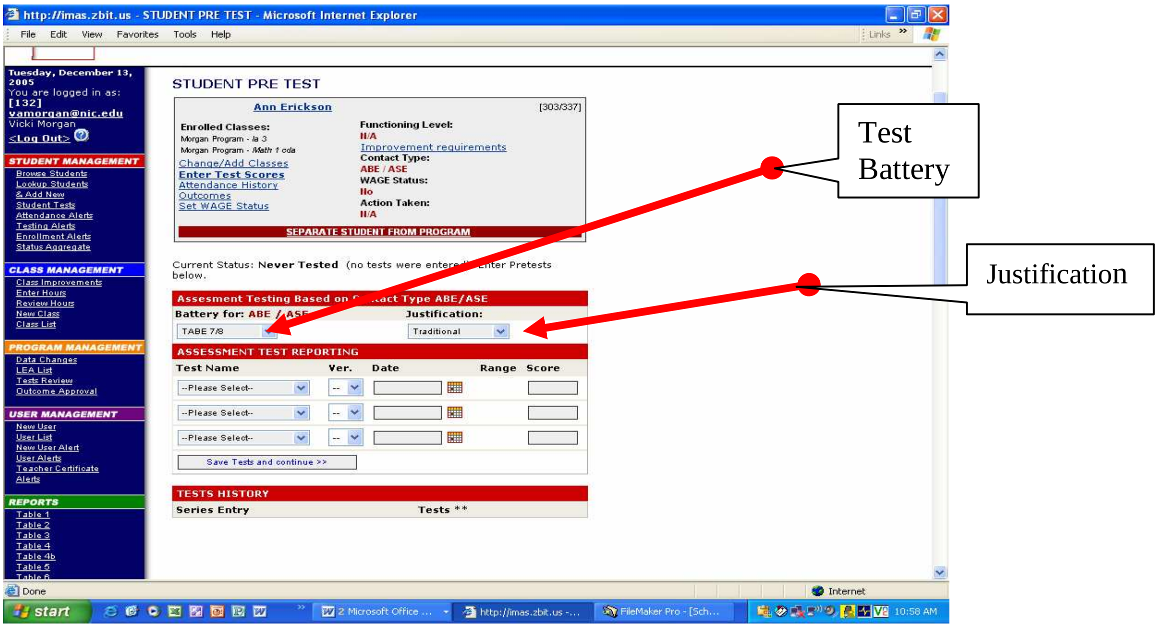


Figure 13

13. Under the "ASSESSMENT TEST REPORTING" box on the "STUDENT TESTS" screen, you will enter the test date, test name, and score. Note that when you enter the test name, your screen may change for a split second and you may have to scroll back down to the "ASSESSMENT TEST REPORTING" box; this happens because the test score range is being configured. After scrolling back down to enter the score, you will see a range. You will have to enter a score between these ranges. After entering your test information, you will click on the "**Save Tests and continue**" box. WARNING: Once you have clicked this button, the test information is entered. If you get to the next screen and hit your back button, you cannot re-save the test information. You will see the following error (Figure 14).

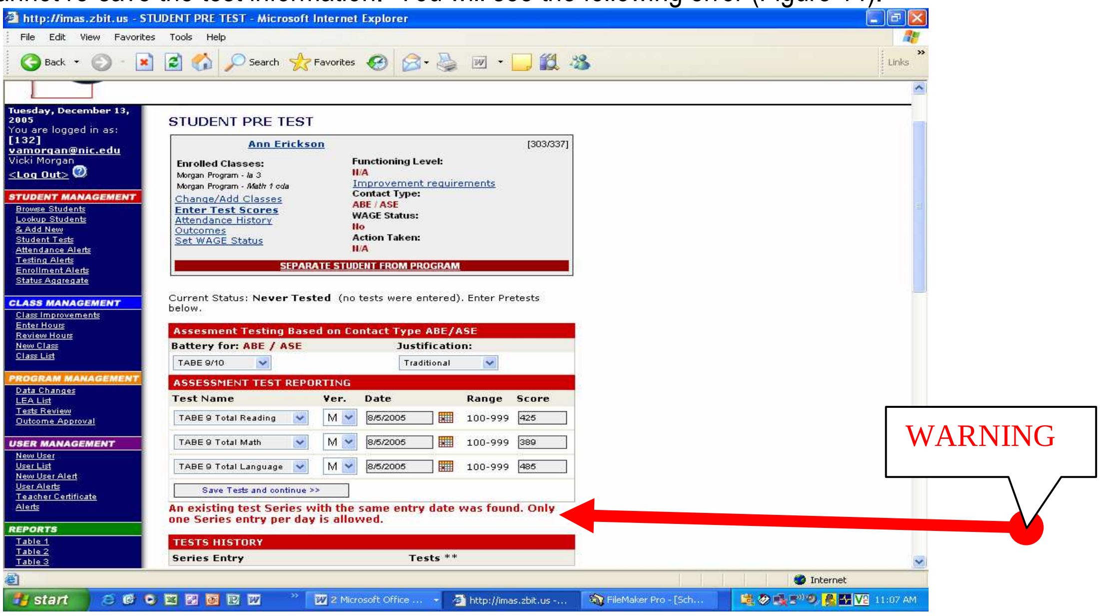


Figure 14

If you get the above error, you must click on the "**Look Up Students & Add New**" under "Student Management" to finish inputting your demographic data. When you click on "Look Up Students & Add New," you will input the Social Security number as you did when you first enrolled this person. The "ADD/EDIT" screen will appear on this person, and you will scroll to the "Goals" box (located toward the bottom of the screen) and click on "edit." This will take you to the "STUDENT GOALS" screen (Figure 15).

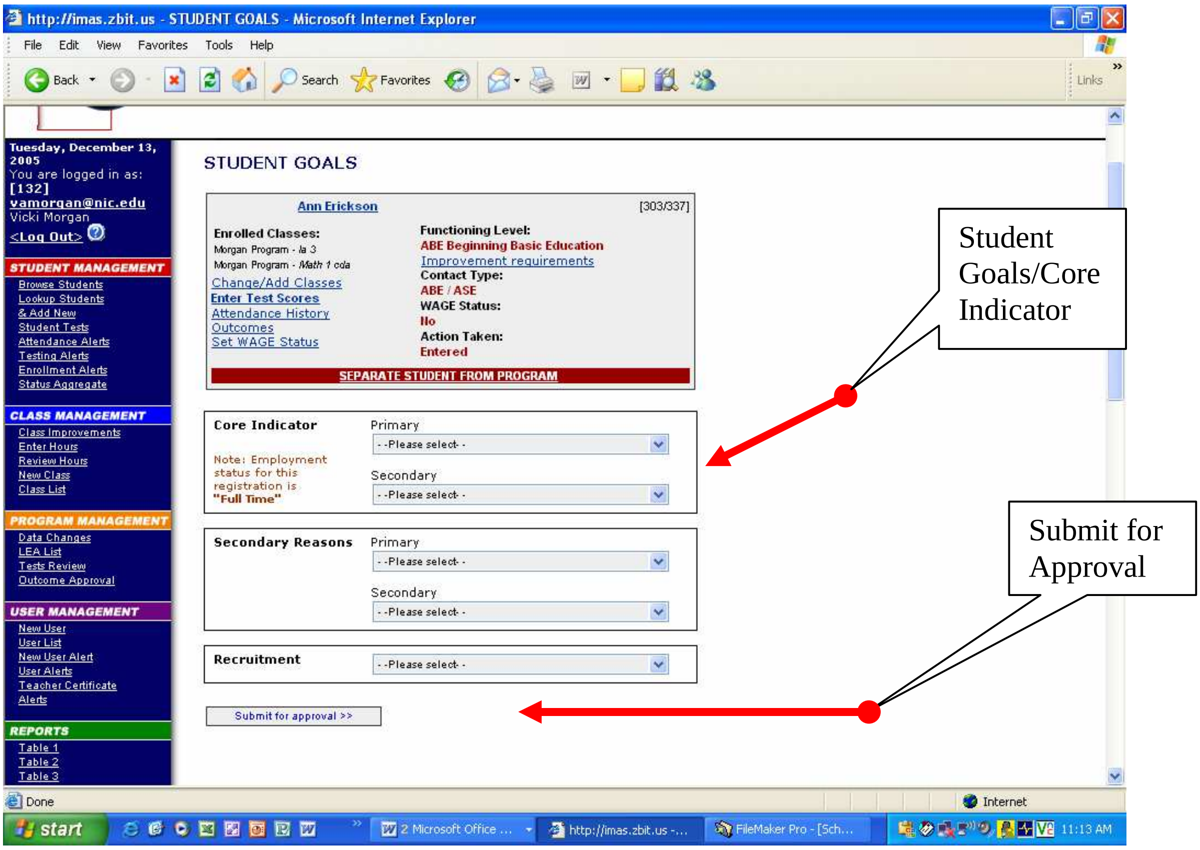


Figure 15

14. The "STUDENT GOALS" screen (Figure 15) is the screen where you will finish inputting your demographic data. If you had an error like the one above, you will follow those directions to get here. If you clicked "**Save test and Continue**" and have no errors after inputting a test, you will get to this screen. You will finish inputting Core Indicator, Secondary Reasons, and Recruitment here. Once you have finished, you will click on "**Submit for Approval**," and you will have finished entering this student.

15. Once you click "**Submit for Approval,**" you will get the "STUDENT REVIEW" screen (Figure 16), where you can check the information that has been input and make any corrections necessary.

Figure 16

Data Changes and Approval Process

Any time data is input, it must be submitted for approval to the designated authority (authority is determined by the Program's director). Approval may be given individually as data entry occurs; collectively, as a group of students are input; or piece by piece, after each "section" is input (i.e., enrollment, test information, updates, etc.). It is recommended that each region, have a policy of when to do approvals; otherwise, the approvals can be overlooked or become a huge problem.

If your role is set with the authority, go to the Program management section "**Data Changes**." You will be taken to the "DATA CHANGES (APPROVAL)" screen (Figure 17).

WARNING: After test score and attendance entries are APPROVED, they cannot be changed or edited. For example, if you input test scores and discover that one of the test scores is wrong, you may go in and modify it as long as it is *waiting* for approval. However, after that test has been approved, you can no longer modify it. Also, until information is actually approved, it will not show up on any tables. If you decline any of the items on the approval list, it will delete all information associated with that item.

1. Under the "Data Changes (Approvals)" heading, you will see "Awaiting Authorization:" and under this are "Student Registrations," "Student Profile Data Changes," "Student Test Scores Entered," and "Class Hours Entered." The numbers of entries/updates/changes are listed (Figure 17).

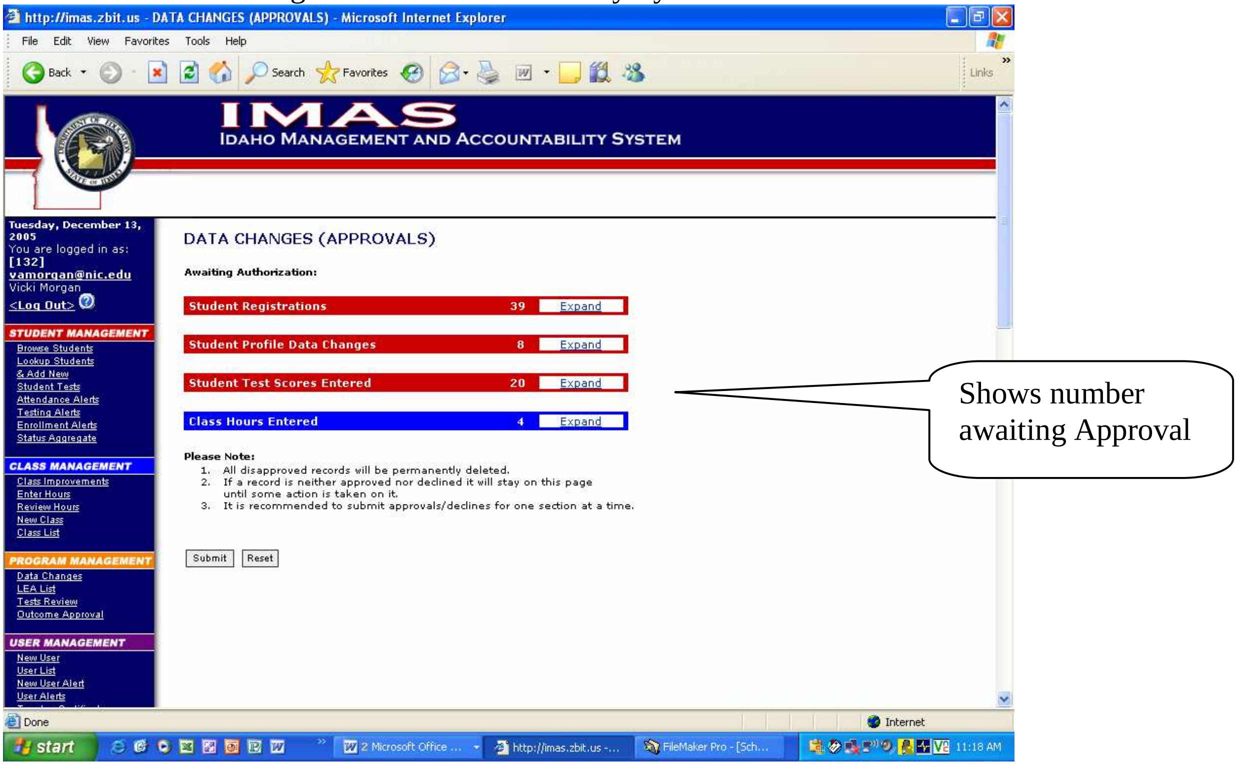


Figure 17

2. If you click “Expand” on any of the categories, you will see details of what is waiting to be approved (Figure 18).

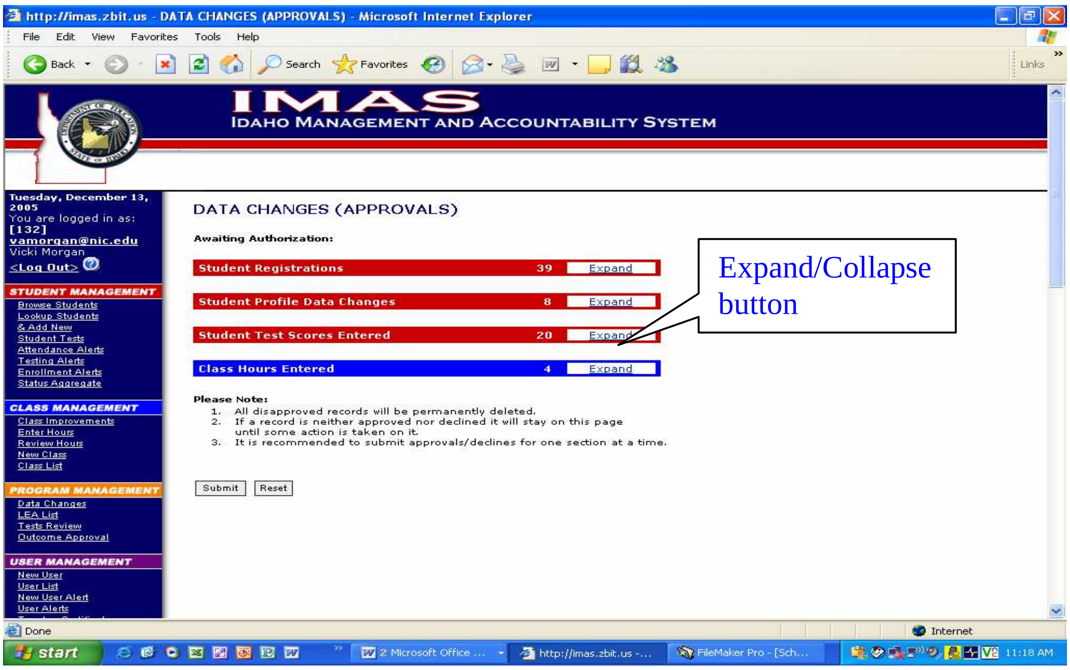


Figure 18

3. You may approve (or decline) all students at one time, or you may do this individually. This is a matter of preference. The approvals for each category may include multiple pages (pages show at the bottom of each section). **<u>You can only approve or decline one page at a time</u>**. You also may expand more than one category at a time. Clicking “Collapse” will collapse the box and will give you just the category heading. Once you have checked the box relevant to approving or declining student information, you will click submit. AFTER SUBMISSION OF APPROVAL, YOU WILL NO

LONGER BE ABLE TO CHANGE STUDENT CONTACT TYPE, TEST, AND ATTENDANCE DATA. Be sure all information is accurate BEFORE you approve it.

4. Once you click the "submit" button at the bottom of the screen, you will get a message that asks if you want to commit to the changes (Figure 19). Clicking "OK" will approve/decline the information and will remove that student's name from the "Awaiting Authorization" list.

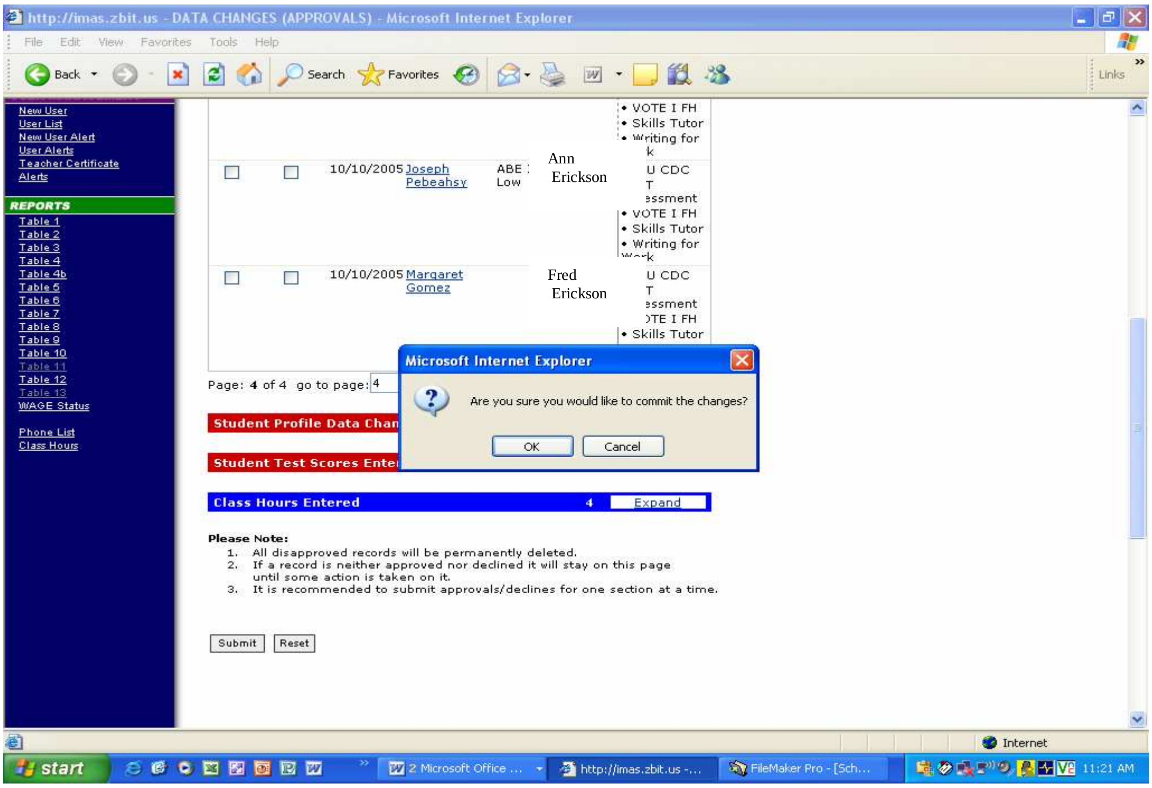


Figure 19

Note: After you collapse the category in which the approval was submitted, the category will reflect the difference in the number awaiting approval (Figures 17-18).

If you need to make changes to demographics, you will have to approve those changes. The changes will show up under "Student Profile Data Changes." Until you approve the change, the information (i.e., street address, phone number, etc.) will not reflect the change on the student profile page.

Classes

To add or delete/remove a student from a class, you will look up the student and click on Change/Add Classes in the Student Snapshot box. It will list the class or classes the student is enrolled in and give you the opportunity to enroll a student into a class. To separate a student from a class, click on separate beside the class name and enter the separation date. If you need to re-enroll the student in a class that they have been separated from, click on re-enroll and enter the enrollment date. To choose between separating a student or deleting the student from a class, choose delete if the option is available. If it is not available, it means that the student has attendance in that class.

Separations and Outcomes

To separate a student from the Program, you look up the student; there is a bar on the bottom of the Student Snapshot box – **SEPARATE STUDENT FROM PROGRAM**. **(Figure 20)** Click this link, and it will give you the option to enter a separation date for the student.

If there is more than one current registration for this student, make sure that your region/site is the one highlighted in yellow. The yellow registration is the active one. You can now separate your region/site registration and the other registration is now the only current one.

Students Being Separated with Outcome Indicators

Separate Student – Prior to separating, make sure "Core Goal" has been entered and attendance approved. Separate by clicking the red "Separate Student from Program" (Figure 20). When the confirmation box pops up, click "OK."

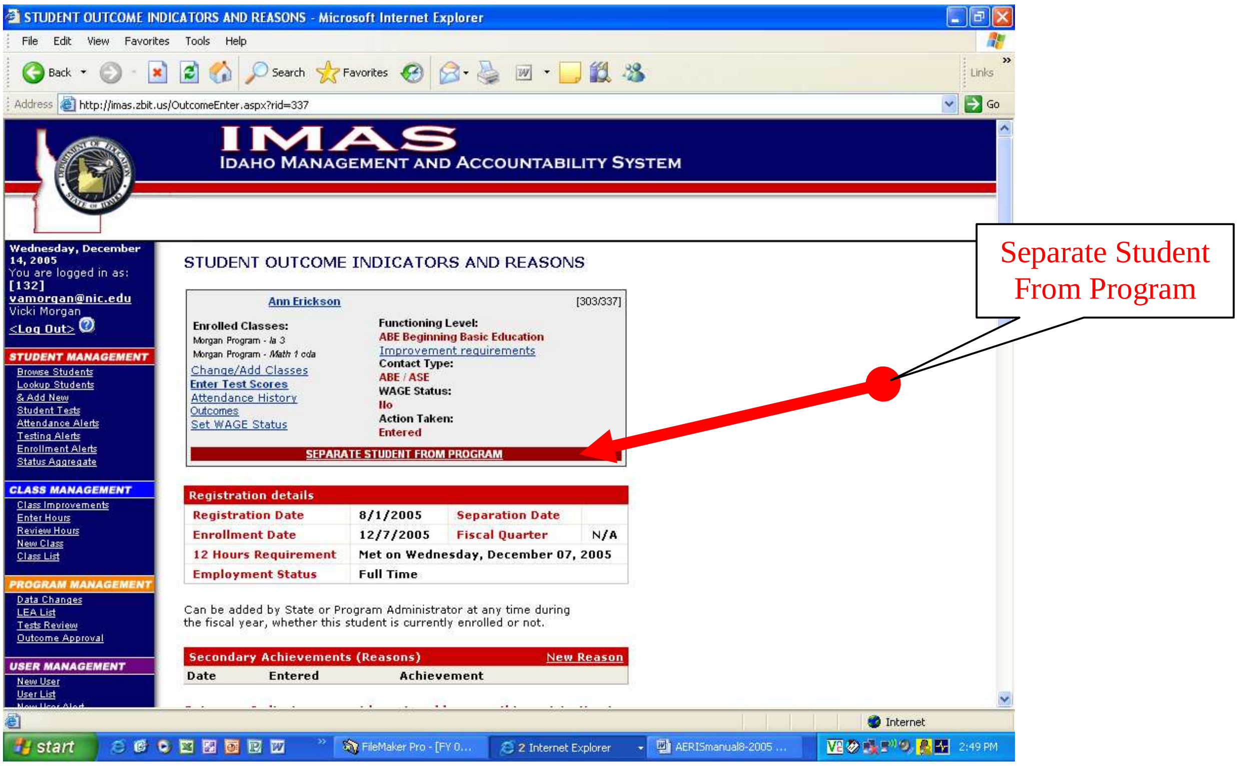


Figure 20

Go to "Student Review" page by clicking on the student name in the top of the gray Student Snapshot box (blue name link).

- Click on "Outcomes" in the gray student snapshot box – this will pull up "Student Outcome Indicators and Reasons" (Figure 21).
- Scroll down to "Outcome Indicators." Click on "New Indicator." Page will blink (Figure 21).

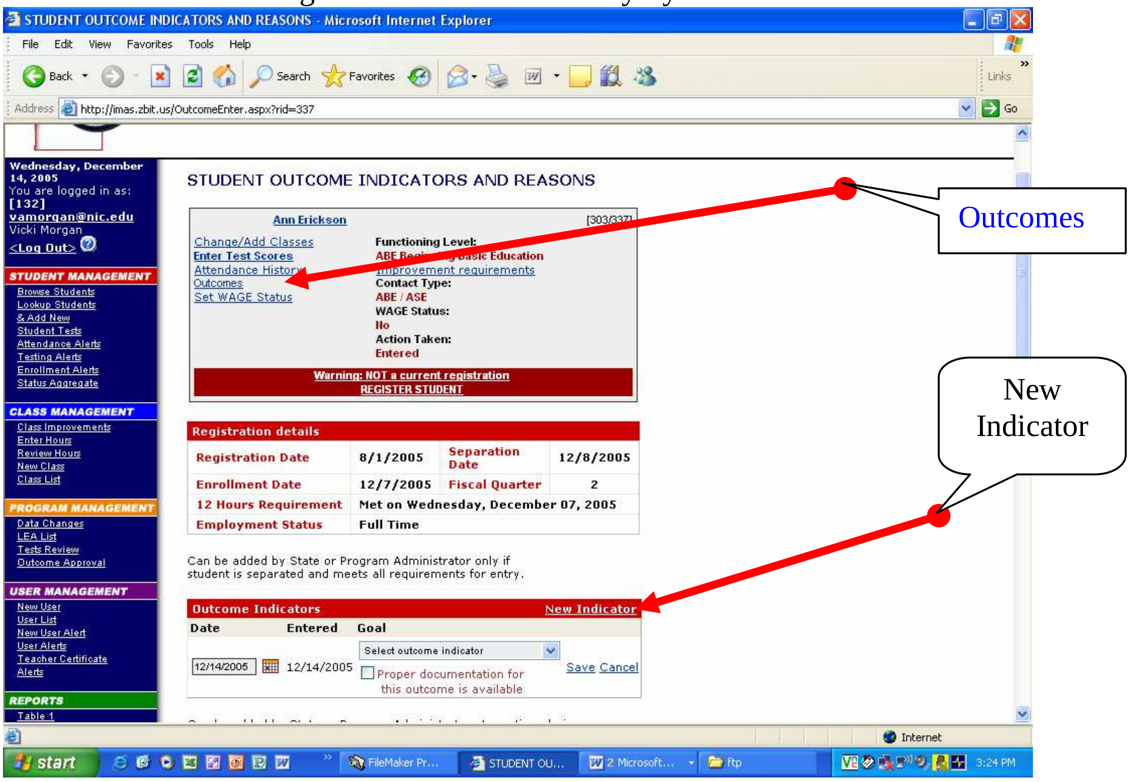


Figure 21

- ❑ Scroll down to "Outcome Indicators." Enter date of goal achievement.
- ❑ Click on "New Outcome Indicator" drop down box. ***Ignore the "Improve Basic Literacy Skills" choice. Do not select literacy skills*** (Figure 22).
- ❑ Select proper outcome indicator. Page will blink after indictor has been selected (Figure 22).
- ❑ Click in box "Proper documentation for this outcome is available" (Figure 22).
- ❑ Click "Save."
- ❑ Message "One outcome indicator was successfully saved" will be displayed.

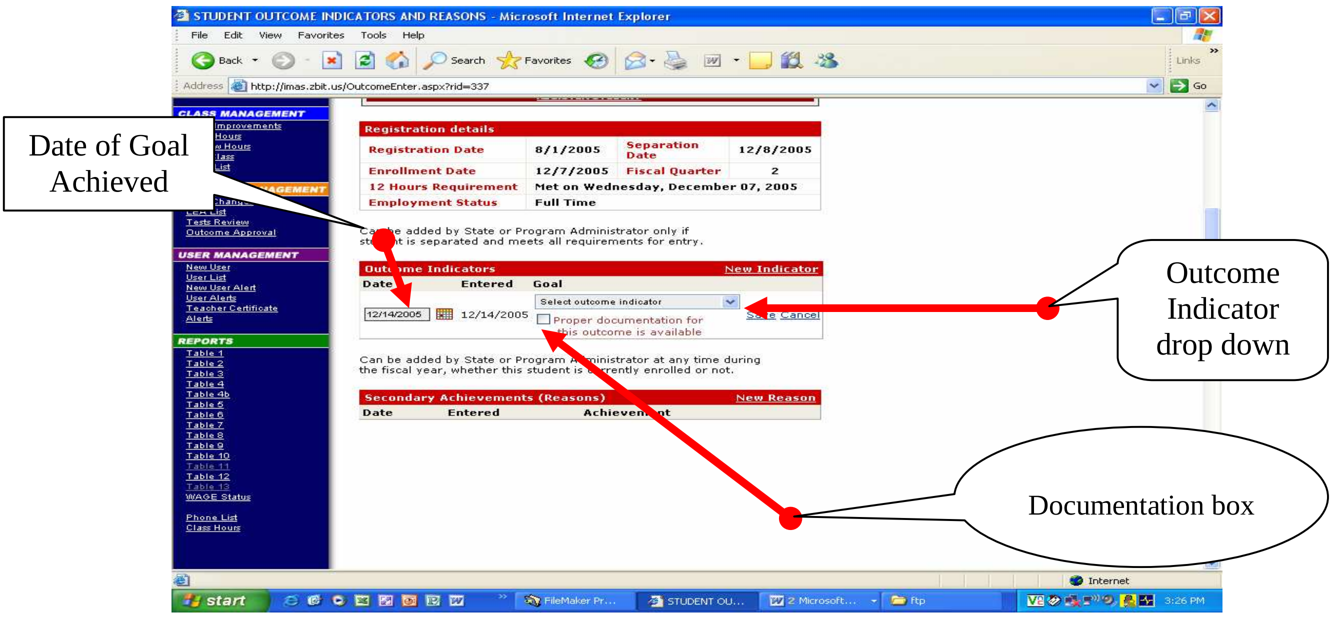


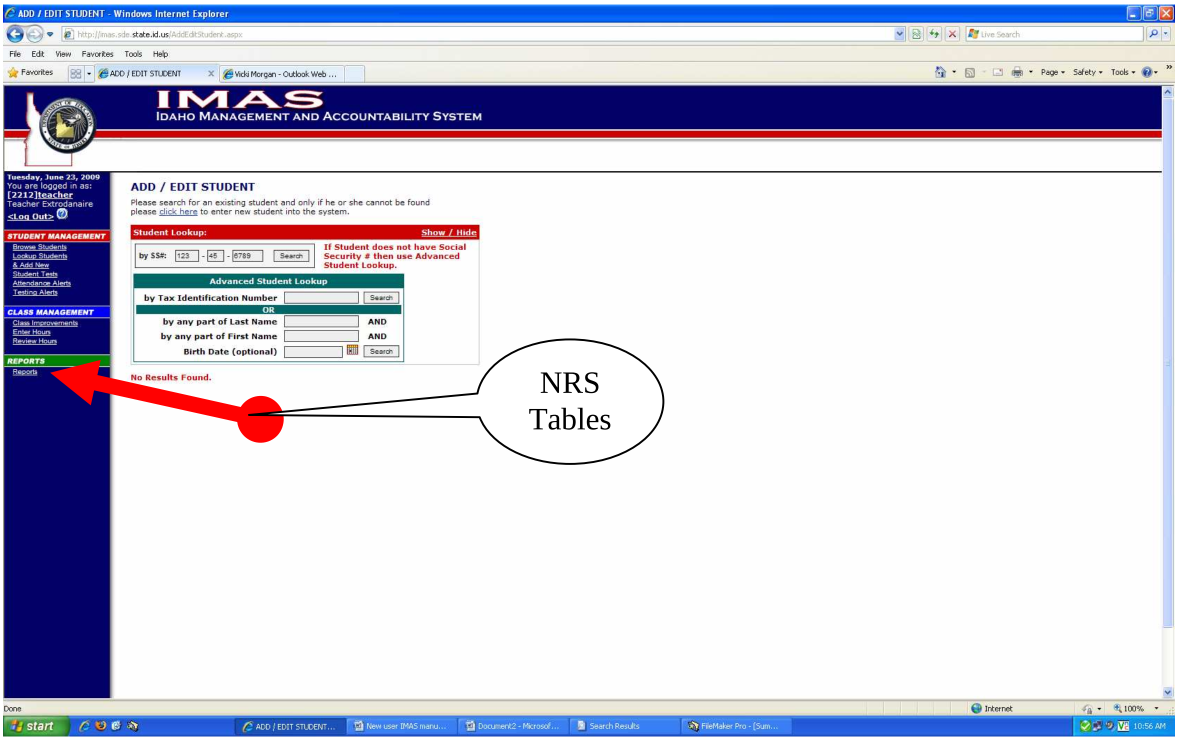
Figure22

Students Who Have Already Been Separated

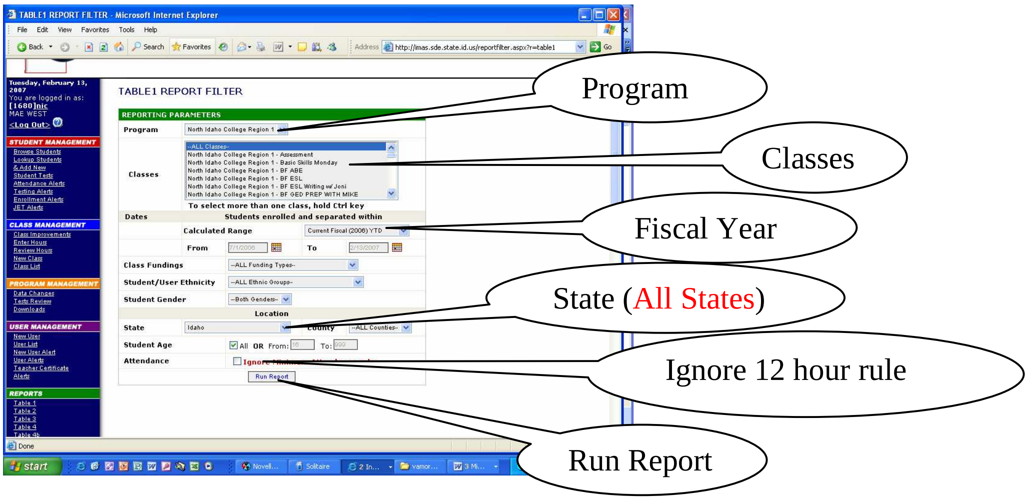
- Enter Social Security number and click "Search."
- Click on student's name in gray Student Snapshot box; this will reveal the Student Profile page.
- Click on "Outcomes" in the gray Snapshot box for the "Student Outcome Indicators and Reasons."
- Scroll down to “Outcome Indicators.” Click on “New Indicator.” Page will blink (Figure 21).
- Scroll down to “Outcome Indicators.” Enter date of goal achievement.
- Click on "Select Outcome Indicator" drop down box. ***Ignore the “Improve Basic Literacy Skills” choice. Do not select “literacy skills”*** (Figure 22).
- Select proper outcome indicator. Page will blink after indictor has been selected (Figure 22).
- Click in box "Proper documentation for this outcome is available" (Figure 22).
- Click "Save."
- Message "One outcome indicator was successfully saved" will be displayed.

Procedures for Looking at Tables

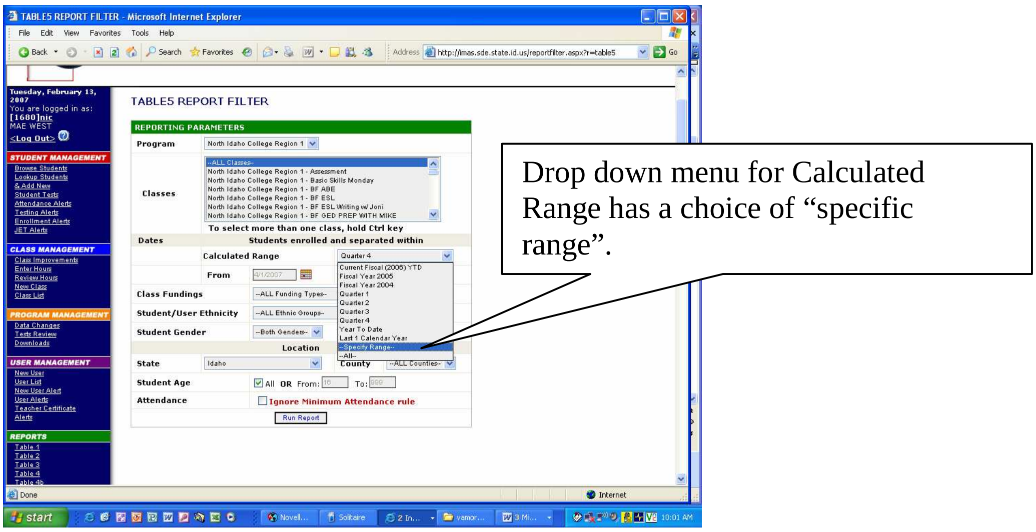
To access the NRS tables click on “Report” at the bottom of the Navigation Menu. You will find all of the NRS reports and a few other useful reports such as Student phone list here.



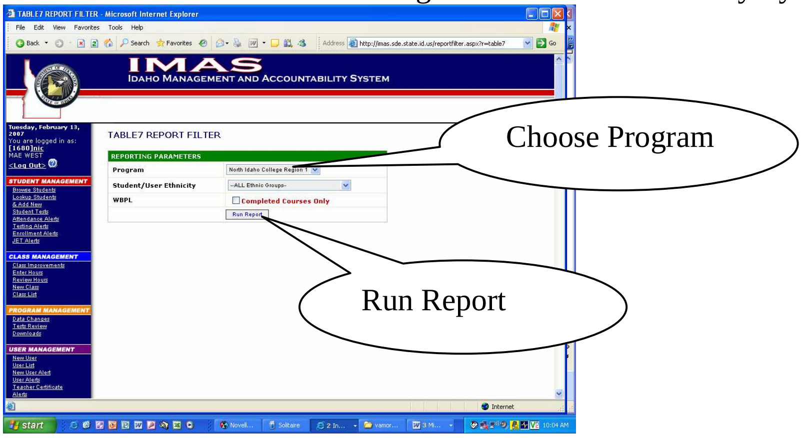
Tables 1-4B, 6, 8-14 are all pulled up in the same manner. Choose program, classes, fiscal year or specific range, class funding (optional), ethnicity (optional), gender (optional), state (choose all states if not set as default), student age will be left at 16, then choose whether to ignore the 12 hours or more rule or not to ignore it (default is not to ignore). Click on "Run Report".



On table 5 you must choose the specific range. Then you will enter in the beginning date and ending date in the two boxes next to "From". All other steps are the same as the other tables.



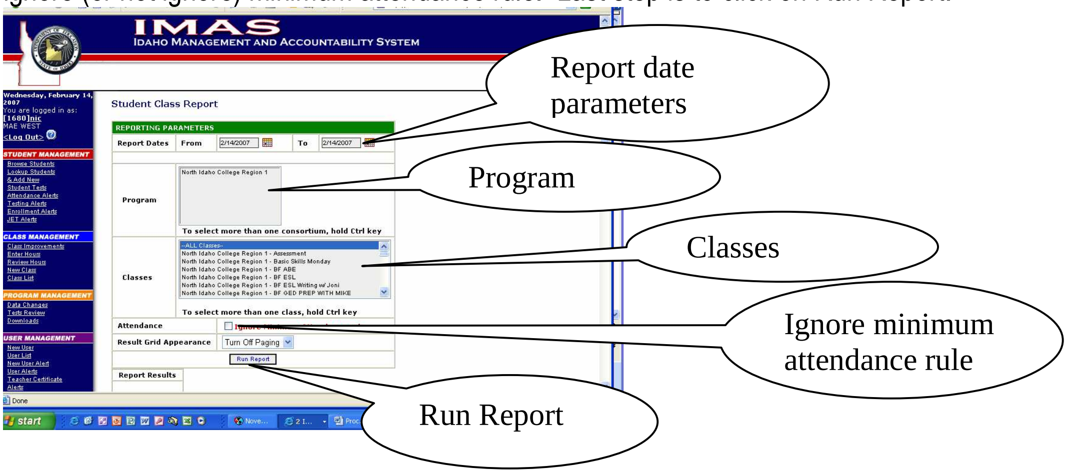
On table 7, you will choose the program and ignore the other parameters. Click on "Run Report".



Each report shows different aspects of the regional/state data.
Table 1: Participants by Entering Education Functioning Level, Ethnicity, and Gender
Table 2: Participants by Age, Ethnicity, and Gender
Table 3: Participants by Program Type and Age
Table 4: Educational Gains and Attendance by Educational Functioning Level
Table 4B: Educational Gains and Attendance for Pre- and Post-tested Participants
Table 5: Core Follow-up Outcome Achievement
Table 6: Participant Status and Program Enrollment
Table 7: Adult Education Personnel by Function and Job Status
Table 8: Outcomes for Adults in Family Literacy Programs (Optional)
Table 9: Outcomes for Adults in Workplace Literacy Programs (Optional)
Table 10: Outcomes for Adults in Correctional Education Programs
Table 11: Secondary Outcome Measures (Optional)
Table 12: Work-based Project Learners by Age Ethnicity, and Gender (Optional)
Table 13: Core Follow-up Outcome Achievement for Prior Reporting Year and for Unintended Outcomes (Optional)
Table 14: Local Grantees by Funding Source

Student Class Report

Below the last table is the Student Class report. This can be useful to both teacher and program administrator. This report shows the names of the students that have been associated with a specific class. It also shows, SSN, registration date, separation date, entering EFL, current EFL, achieved level gain, YTD hours of attendance, date range hours of attendance, GED date passed.
To access this report, click on Student Class below the last table listed. Choose the report date parameters (default is current date) then choose consortia (program) and class(es) that you wish to view. You will also need to choose ignore (or not ignore) minimum attendance rule. Last step is to click on Run Report.



Help

The online help at this time is http://www.pte.idaho.gov/AdultServices/IMAS_NRS/Index.html and is useful. For any problems, corrections, or questions you should first go to your local coordinator. If you can't get help at the local level, contact the above address and state your need. You should hear back from someone on the state level shortly.

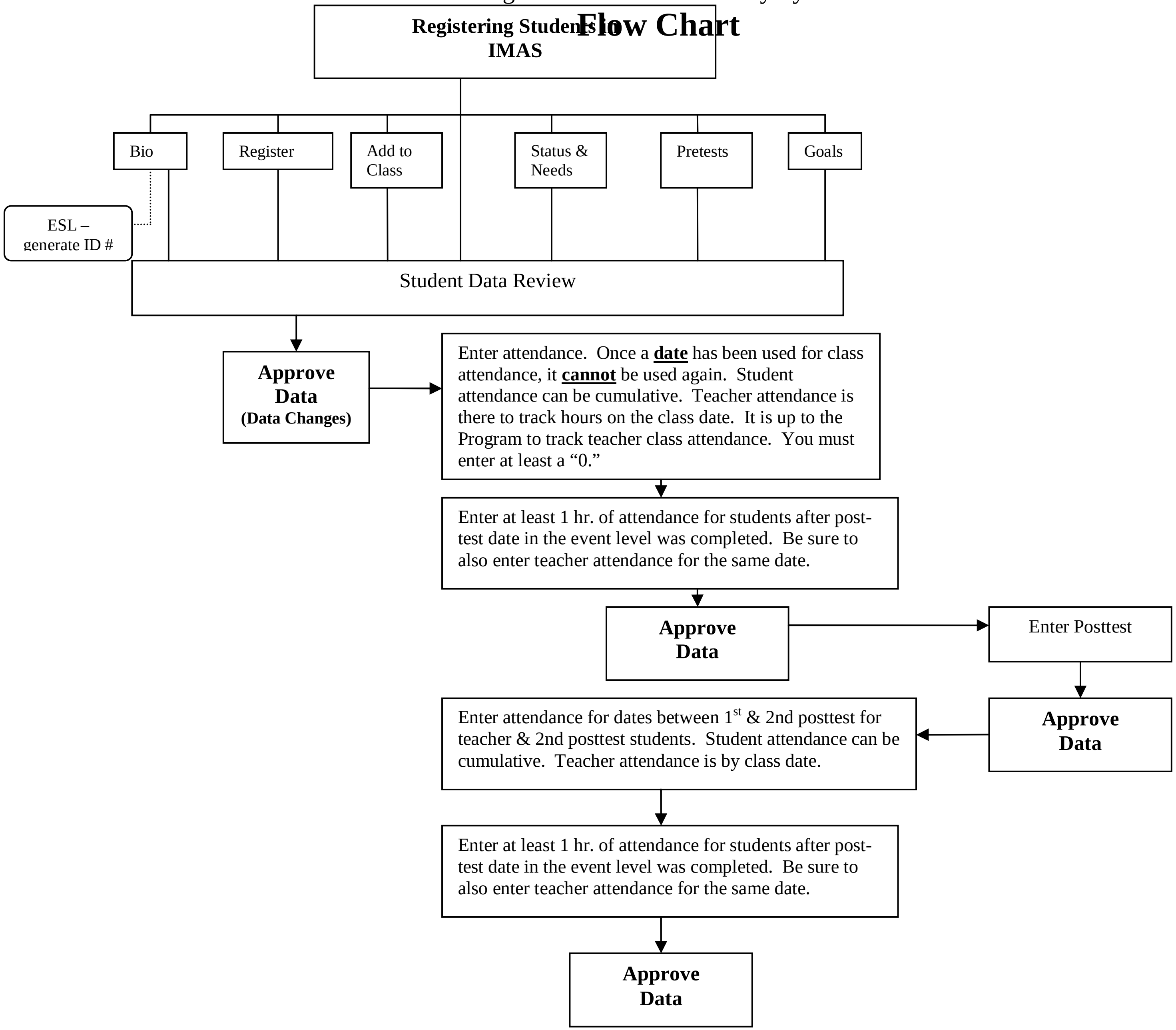
Tips

- As usual, keep a paper trail for documentation.
- A posttest can't be entered until the pretest has been approved if the student has finished a level. This means that you may need to APPROVE some data prior to continuing to enter additional data.
- Be sure to check the bottom of each screen for a "**Save**" **or "Continue"** button before going to another screen. If the "**Back**" arrow is clicked before saving, the data entered will be lost.
- No data will be reflected in tables until it has been APPROVED.
- Click on **"Data Changes"** to APPROVE data.
- Read message board information each time you log on.
- **Registration date and type cannot be changed by teachers or regions**.
- **If students are enrolled in two Programs and they leave your Program, you can separate them from your region and they will stay active for the other region.**

- **Keep up to date on all data entry**.

Attendance for all students and teachers on a specific date should be entered at the same time. Once a date is used, it cannot be used again for that class.

Flow Chart


Registering Students in IMAS
Bio
Register
Add to Class
Status & Needs
Pretests
Goals
ESL – generate ID #
Student Data Review
Approve Data (Data Changes)
Enter attendance. Once a **date** has been used for class attendance, it **cannot** be used again. Student attendance can be cumulative. Teacher attendance is there to track hours on the class date. It is up to the Program to track teacher class attendance. You must enter at least a "0."
Enter at least 1 hr. of attendance for students after post-test date in the event level was completed. Be sure to also enter teacher attendance for the same date.
Approve Data
Enter Posttest
Approve Data
Enter attendance for dates between 1st & 2nd posttest for teacher & 2nd posttest students. Student attendance can be cumulative. Teacher attendance is by class date.
Enter at least 1 hr. of attendance for students after post-test date in the event level was completed. Be sure to also enter teacher attendance for the same date.
Approve Data

Appendix # 4 - Contact Information

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IMAS Helpline
http://www.pte.idaho.gov/AdultServices/IMAS_NRS/Index.html